

TERMS OF REFERENCE FOR CONSULTANTS

A. Introduction

1. The terms of reference for consultants describe the main tasks under this technical assistance (TA). The TA has three outputs (i) Output 1: capacity of selected Program Keluarga Harapan (PKH) implementers improved; (ii) Output 2: PKH implementation in disadvantaged areas strengthened; and (iii) Output 3: analytical, communications, and advocacy skills of Ministry of Social Affairs (MOSA) staff enhanced. The TA will require 34 person-months of international and 113 person-months of national consulting.

2. Consulting firms will be engaged for Outputs 1 and 3 and will be selected using quality- and cost-based selection (QCBS) method, with 90:10 quality-cost ratio and simplified technical proposals, when feasible. Consultants under these two outputs will be under lump-sum and performance-based contracts. Asian Development Bank (ADB) will engage consultants on an individual basis for Output 2 using the individual consultant selection (ICS) method. Consultants for Output 2 will be time-based and engaged on an intermittent basis, when feasible. Consultants will be engaged in accordance with ADB Procurement Policy (2017, as amended from time to time) and the associated PAIs/TA Staff Instructions.

3. Training, consultations, and workshops will be organized by ADB or by the consultants in accordance with ADB Procurement Policy (2017, as amended from time to time) as appropriate. The team will coordinate closely with the MOSA, National Development Planning Agency (BAPPENAS), and other key stakeholders during TA implementation.

B. Output 1: Capacity of selected PKH implementers improved: Consulting Firm

4. Scope of work. The capacity building consulting firm will be responsible for the following outputs: (i) a capacity and training gap assessment, focused on the operations and delivery systems of PKH and the implementation of family development sessions (FDS), and in coordination with Output 2 consultants, on PKH-Akses and PKH for elderly; (ii) a human resource development plan for the PKH unit of the Directorate of Family Social Insurance (JSK), the PKH-Akses group, the training unit of MOSA, and the communications unit or staff of JSK; (iii) training plan including design of the training program, manuals, and training aids; (iv) conduct training for supervisors, coordinators, facilitators, and select staff, including for PKH-Akses, elderly, and children with disability; (v) coaching and management advisory services for key staff of JSK; and (vi) finalized training manual and materials, human resource plan, and related human resource materials.

5. To deliver these, the package will include the following indicative positions (i) international capacity building specialist (9 person-months), (ii) national capacity building specialist (21 person-months); (iii) two national training facilitators (30 person-months); and (iv) national human resource and development specialist (11 person-months).

6. **Capacity Building Specialist (international, 9 person-months) and Output 1 Team Leader.** The specialist shall oversee delivery of outputs under Output 1. He/she shall lead the work in capacity and training needs assessment, training plan and design preparation, and training delivery. He/she shall specifically:

- (i) develop institutional and capacity assessment tools to assess the current state of JSK's staff and organization, and use these tools in preparing a needs assessment;

- (ii) develop a tool to evaluate the effectiveness of TA interventions and use it to review existing training or capacity support interventions, materials, and methodologies in JSK, other units of MOSA, and similar projects of other development partners;
- (iii) conduct a capacity and training needs assessment and design training modules and a training methodology for PKH, PKH-Akses, and PKH for elderly and children with disability;
- (iv) develop methodologies for training and continuing learning for JSK PKH staff, including the use of e-learning;
- (v) conduct training for supervisors, coordinators and facilitators, consultation workshops, focus group discussions, and coaching sessions on effective operations, management of social services programs, including staff of PKH-Akses and PKH for elderly and children with disability;¹
- (vi) prepare knowledge product on the project highlighting innovations and results;
- (vii) develop an institutionalization plan for continuing learning and skills upgrading;
- (viii) coordinate with social work learning institutions in the development of training modules and ensure gender issues are mainstreamed into all assessment tools and training materials developed;
- (ix) coordinate with key development partners and initiatives on the project;
- (x) participate in project meetings, workshops, planning, and review meetings;
- (xi) prepare reports (inception, mid-term, and completion) that includes lessons learned, innovations, and recommendations that would ensure that the gains achieved from the technical assistance are fully institutionalized; and
- (xii) perform any other tasks as may be reasonably requested by ADB or the government.

7. Preferred Qualifications and Experience: The expert should have at least 10 years professional experience in capacity building, training, and institutional development or other similar work. He/she should have a good understanding of gender issues in social protection. He/she should have at least a master's degree in human resource development and management, social work, public administration, education, or a related field. He/she should have knowledge and experience in developing learning modules, including online learning, and providing training to public sector of civil society organizations. Knowledge of ADB and/or official development assistance TA administration procedures and experience of implementing TAs would be an advantage.

8. **National Capacity Building Specialist (21 person-months)**. The specialist shall assist the team leader in the oversight, coordination, and delivery of the TA outputs. He/she shall provide support to the international capacity building specialist in designing and delivering training, preparing reports, and providing administrative support to TA activities. Specifically, the expert shall:

- (i) provide inputs and contribute to the preparation and completion of the capacity and training needs assessment and human resource development plans;
- (ii) ensure logistical and administrative support during trainings/workshops;
- (iii) prepare reports on TA progress and monitor TA activities, budget and workplan, in coordination with the team leader;
- (iv) provide counterpart support to the international capacity building specialist to prepare the capacity development plan, develop training materials, training aids,

¹ The expert will coordinate closely with Output 2 consultants in the design, development of materials, and provision of training for PKH-Akses and PKH for elderly and children with disability.

- (v) training methodologies, and design of continuing learning activities for JSK-PKH;
- (vi) manage all capacity development activities, focus group discussions, high level meetings and act as resource person to all training and workshops under the TA;
- (vii) assist team leader in overseeing delivery of knowledge products, including their production, translation, and publication;
- (viii) coordinate and network with national education institutions to develop a roster of resource persons for JSK and for the TA;
- (ix) provide translation support to the TA team, as necessary, and in the translation of materials in Bahasa Indonesia;
- (x) participate in project meetings, workshops, planning, and review meetings;
- (xi) prepare reports (inception, mid-term, and completion) that includes lessons learned, innovations, and recommendations that would ensure that the gains achieved from the technical assistance are fully institutionalized; and
- (xii) support team leader in undertaking selective analytical and communication work on other planned social assistance reforms, as requested by MOSA and BAPPENAS.
- (xiii) perform any other tasks as may be reasonably requested by ADB or the government.

9. Preferred Qualifications and Experience The national capacity building specialist should have at least a bachelor's degree in social work, human resource management, education, or management. The specialist should have at least 5 years of experience in providing training or capacity building to the public sector or civil society organizations, or managing capacity building projects. He/she should have good organizational skills and be able to communicate well in English. Knowledge of ADB and/or official development assistance, TA administration, and experience implementing TAs would be an advantage.

10. **Two National Training Facilitators (30 person-months).** The facilitators shall provide training administration and facilitation support to all training, workshops, meetings, and focused group discussions under the TA. They shall:

- (i) act as training or event secretariat, facilitate workshops, and small group discussions;
- (ii) document all proceedings and prepare reports on TA activities;
- (iii) ensure logistical and administrative support to all TA activities;
- (iv) conduct research and data gathering in support of the team leader and the capacity building specialist;
- (v) organize events, meetings, and training;
- (vi) provide translation support to the TA team, as necessary, and in the translation of materials in Bahasa Indonesia
- (vii) perform other tasks as required by the government or ADB.

11. Preferred Qualifications and Experience. The facilitators should have a bachelor's degree, preferably in education, social work, or management. They should have at least 3 years of experience providing facilitator support or management support to capacity building activities. An excellent verbal and written communication skills in English are required.

12. **National Human Resource and Development Specialist (11 person-months).** In collaboration with JSK, the specialist shall assist the international human resource specialist in the conduct of assessments, development of human resource plans, and in the roll out of the human resource plan, He/she shall:

- (i) liaise with the human resources team of JSK and MOSA, gather documents, and

- (ii) undertake research to support the development of a human resource plan; prepare background documents, tables and research reports for the assessment of human resources, logistics, and administrative systems of the project;
- (iii) under the direction of the international specialist, undertake comparative studies on benefits and salaries to establish a guide for JSK;
- (iv) support JSK in the roll out of the plan;
- (v) provide translation support to the TA team, as necessary, and in the translation of materials in Bahasa Indonesia;
- (vi) participate in project meetings, workshops, planning, and review meetings;
- (vii) prepare reports (inception, mid-term, and completion) that includes lessons learned, innovations, and recommendations that would ensure that the gains achieved from the TA are fully institutionalized; and
- (viii) perform any other tasks as may be reasonably requested by ADB or the government.

13. Preferred Qualifications and Experience. The national human resource development specialist should have a degree in human resource development with at least 3 years of experience in human resources work, training, or administration of personnel benefits. He/she should have good organizational skills and be able to communicate well in English.

C. Output 2: PKH implementation in disadvantaged areas strengthened: Individual consultants (35 person-months)

14. ADB will engage consultants on an individual basis for Output 2 using the ICS method. Output 2 consultants consist of (i) an international social protection specialist and team leader (11 person-months); (ii) a national social protection specialist (15 person-months); (iv) an international human resource development specialist (4 person-months) and (iii) an international management information system specialist (5 person-months).

15. **International Social Protection Specialist and Overall Team Leader (11 person-months).** The specialist will be responsible for the following: (i) overall coordination of the TA and its outputs; (ii) oversee and ensure delivery of activities under Output 2, including a diagnostic option for improvement and policy or procedures in Akses areas; and (iii) draft standard operating procedures for operationalizing PKH in difficult to reach locations. Specifically, the specialist and team leader shall:

- (i) prepare and monitor the work program for the TA;
- (ii) coordinate with outputs 1 and 3 consultants in planning work, including the review of training and workshop designs, schedule, and material development;
- (iii) oversee the outputs of consultants and provide them guidance in undertaking tasks under the TA;
- (iv) review implementation progress of PKH and PKH-Akses, and prepare an assessment of the implementation of Akses (diagnostic paper) in sample Kabupatens representative of Papua and West Papua and on PKH for elderly, covering design, operational, capacity, and logistical issues in ensuring effective PKH implementation;
- (v) identify policy options, actions to address design, operational, capacity, and logistical gaps for strengthening PKH-Akses and PKH for elderly and children with disability, proposing areas for improvement in policy, operations, business process, financing and logistical support, and staffing and support the testing of improvements with MOSA and JSK;
- (vi) provide coaching and management advisory services to key staff of JSK and

- various sub-directorates;
- (vii) look into potential areas for future support or unmet needs and develop options for support from ADB or other development partners to further strengthen PKH;
- (viii) ensure gender elements are incorporated into assessment, approach, analysis and that these are mainstreamed and incorporated into all assessments, approach, and activities;
- (ix) provide inputs to training and material development, especially in PKH-Akses and PKH for elderly and children with disability;
- (x) coordinate closely with other consultants and ensure coherence in approach and plans;
- (xi) oversee development and publication of all knowledge products under the TA;
- (xii) meet and coordinate with development partners on potential collaboration, and sharing of information and resources;
- (xiii) participate in project meetings, workshops, planning, and review meetings; and act as a resource person, as needed;
- (xiv) prepare reports (inception, mid-term, and completion) that includes lessons learned, innovations, and recommendations that would ensure that the gains achieved from the TA are fully institutionalized;
- (xv) undertake selective analytical and communication work on other planned social assistance reforms, as requested by MOSA and BAPPENAS;
- (xvi) provide continuing advisory support in reviewing capacity and systems gaps; providing recommendations; and developing a road map for operationalizing recommendations for the non-cash transfer program (BPNT) of MOSA; and
- (xvii) perform any other tasks as may be reasonably requested by ADB or the government.

16. Preferred Qualifications and Experience. The specialist should have a postgraduate degree in the social sciences, public administration, or equivalent, preferably with 10 years of international experience in social protection, social assistance, poverty reduction, and social development. Understanding of gender issues and skills in mainstreaming gender in social protection are required. The specialist should have experience leading and implementing similar projects in developing countries, preferably in Asia. Experience in cash transfers and working in projects in Indonesia are an advantage. Knowledge of ADB and/or official development assistance, TA administration procedures, and experience of implementing TAs would be an advantage. Experience of working in Indonesia is preferred.

17. **Human Resource and Organizational Development Specialist (international, 4 person-months)**. The expert shall assess the organizational, staffing, and logistical support for PKH staff. He/she shall prepare a human resource development plan for the PKH unit of JSK, the PKH-Akses group, the training unit of MOSA, and the communications unit or staff of JSK. Specifically, the expert shall:

- (i) assess the organizational and staffing pattern of JSK-PKH, the communications staff, and the operational units in Akses areas;
- (ii) in collaboration with JSK, develop options and prepare recommendations on staffing, competency and skills mix, as well as training required for staff prior to deployment. The plan will describe the staffing and skills needed to effectively implement an expanded PKH, identify skills gaps and how to fill them, and develop the terms of reference for the various positions and expertise required by the PKH implementation unit;
- (iii) assist in developing competency profiles and terms of reference of JSK-PKH staff, staff in PKH-Akses, elderly and children with disability, and the communications

- unit;
- (iv) assess the logistics, salary structure, benefit package, and other support requirements of JSK-PKH;
- (v) develop a performance management system for PKH;
- (vi) prepare recommendations to strengthen the hiring and human resource system for JSK-PKH, PKH-Akses, and PKH for elderly; and prepare a recruitment and continuous hiring plan supporting PKH;²
- (vii) ensure incorporation of gender elements in human resource development plans and activities;
- (viii) develop basic pre-and in-service training plan and materials for the staff to be hired;
- (ix) advise and provide coaching and oversight support to the hiring and deployment of project staff to the human resource team of JSK;
- (xiii) participate in project meetings, workshops and planning and review meetings;
- (xiv) prepare reports (inception, mid-term, and completion) that includes lessons learned, innovations and recommendations that would ensure that the gains achieved from the technical assistance are fully institutionalized; and
- (xv) perform any other tasks as may be reasonably requested by ADB or the government.

18. Preferred Qualifications and Experience. The expert should have a post-graduate degree in human resource management, education, public administration, or relevant fields. The expert should also have at least 10 years of experience in human resource or organizational development, conducting training for project staff of social welfare and development, or similar agencies. A good understanding of gender mainstreaming in human resource development is required.

19. **National Social Protection Specialist (15 person-months).** The specialist shall:
- (i) review the design, implementation progress, and lessons learned of the ongoing PKH, PKH-Akses, and PKH for elderly and children with disability, and other similar projects in Indonesia;
 - (ii) undertake research and prepare briefing materials and notes on findings and on areas requested by ADB and MOSA;
 - (iii) organize key stakeholder workshops to present and validate findings;
 - (iv) prepare regular reports discussing the progress of work under Output 2 to be submitted to ADB and the government;
 - (v) assists in coordinating the development and publication of all KPs;
 - (vi) act as resource person to consultants under Output 1; and
 - (vii) complete any other tasks as may be reasonably requested by ADB or the government.

20. The national social protection consultant will support the international consultant in preparing the diagnostics and options paper, collecting, and updating information and data on social protection programs and PKH. He/she will liaise with the focal point in government ministries and meet relevant institutions and stakeholders to collect data and information on social protection arrangements, legislation, and institutions. He/she shall organize training and national workshops with stakeholders, participate in workshops, as requested, and provide translation support.

² The expert will coordinate closely with Output 2 consultants in matters relating to PKH-Akses and PKH for elderly;

21. Preferred Qualifications and Experience. The national consultant should have a university degree in social welfare, sociology, economics, statistics, or related area. The consultant should have at least 5 years experience in research and/or administration in social protection. Good command of written and spoken English is required.

22. **Management Information Systems Specialist (international, 5 person-months).** The specialist will review the business process and data management system of PKH. The specialist will provide options for using management information systems (MIS) and information and communication technology (ICT) to support the program that is economically feasible, user-friendly, and comprehensive. Specific areas to assess and provide recommendations are (i) beneficiary listing and delisting and beneficiary information updating, as well as the maintenance of the payroll and how these systems can interoperate; (ii) compliance verification automation, particularly of the data consolidation and reporting from field to central; (iii) payment system and reconciliation of accounts, with payment windows (cash and non-cash, bank, and non-bank); (iv) use of e-learning, information booths, learning applications, and web-based internal communications systems to update program and beneficiary information, and as tools for continuing learning; (v) development of applications, in coordination with the social media and applications specialist, for information dissemination and information updating; (vi) options in migrating data into improved systems and digitizing existing data; and (vii) other systems or applications that can automate parts or the whole business process and introduce efficiency and lower costs. The specialist shall also conduct training or briefing on solutions that can be introduced and rolled out. He/she shall submit regular reports on the progress of the work and produce a report containing finding and options for the use of MIS and ICT for PKH. The consultant shall also ensure that sex disaggregated data are generated, and that sound analysis is based on it.

23. Preferred Qualifications and Experience. The specialist should have at least a degree in information management, MIS, computer science or ICT with 6–7 years of experience in design, implementation, operations, maintenance of complex systems, involving a significant number of transactions or clientele; experience both at the national and international level, and/or in the public and private sector preferred.

D. Output 3: Analytical, communications, and advocacy skills of MOSA staff enhanced: Consulting firm.

24. Scope of work. The communications consulting firm will be responsible for the following outputs: (i) communications and advocacy strategy for PKH; (ii) options and proposal for an institutional mechanism to implement the strategy for PKH; (iii) training/workshop and coaching for communications unit staff in developing messages and analyzing information for knowledge and information dissemination; (iv) training/workshop on the use of a variety of platforms (including social media) in disseminating information and managing websites; (v) templates for publications, select social media platforms and feeds, public promotional materials, audio-visual materials, marketing presentations (i.e. Power Point and Fact Sheets), newspaper, magazine, and other print media articles to maximize impact of the PKH operations; (vi) proposed improvements to technical design and functionalities and design layout of PKH website; and (vii) design of the process and procedures on how to implement communication activities to ensure consistency and effectiveness.

25. To deliver these, the package will include the following indicative positions: (i) communications and advocacy specialist and output 3 team leader (international, 5 person-

months, intermittent): (ii) national social media and applications specialist (national, 18 person-months); and (iii) national communications specialist (national, 18 person-months).

26. International Communications and Advocacy Specialist and Output 3 Team Leader (5 person-months). The specialist shall lead the work of developing a communications and advocacy strategy for PKH and in developing social media platforms and other modes to transmit messages. He/she shall work closely with training facilitators and consultants in development of training materials and actual delivery of training and in strengthening the analytical skills of JSK's communications staff. He/she shall also develop an institutionalization plan that addresses how JSK shall manage communications needs after the TA, including the potential of establishing a communications unit, how the unit can receive continuing skills upgrading and by developing templates for the agency. Specific tasks include:

- (i) review of existing communications strategy, capacity, and the exposure of PKH in media and among its partners in the past year;
- (ii) provide advice on best practices and cutting-edge media in communicating social protection programs;
- (iii) assess current visibility and exposure of PKH through news accounts;
- (iv) develop a tool on media monitoring;
- (v) meet with key stakeholders to generate their views on a communications strategy for the program;
- (vi) prepare a strategy and advocacy plan (profile and identity for the program and proposed strategic actions for improving program appreciation and recognition) as well as a paper on institutionalization of communications and advocacy work for JSK;
- (vii) design and train relevant staff in communications and social media development and handling;
- (viii) participate in project meetings, workshops, planning, and review meetings;
- (ix) prepare reports (inception, mid-term, and completion) that includes lessons learned, innovations, and recommendations that would ensure that the gains achieved from the technical assistance are fully institutionalized;
- (x) oversee the development of templates, publications, websites, and other communications and advocacy materials under the TA; and
- (xi) perform any other tasks as may be reasonably requested by ADB or the government.

27. Preferred Qualifications and Experience: The specialist should have at least 10 years professional experience in communications and marketing with a solid understanding of brand development and positioning, or other similar work. He/she should have at least a university degree, preferably master's degree in communications/marketing and program management, or public administration. Experience in website and social media design is an advantage. Proven ability to produce effective visual and written marketing content, and concept design is a must. A record of effective/successful logos, brands, advertising messages, websites, and previous experience in developing countries is an advantage.

28. The National Communications Specialist (18 person-months). The specialist shall assist the international specialist draft a communications strategy, train staff, and assess program exposure. He/she shall develop information sharing templates to be used for sharing progress and program updates with the main stakeholders of the program including partner sector ministries at national and local levels, local government units, members of parliament, local and national media, and program beneficiaries. He/she shall also assist in assessing the visibility and outreach of the program, and in developing a media monitoring tool for PKH. The specialist will

lead in organizing and documenting training, workshops, and meetings related to Output 3.

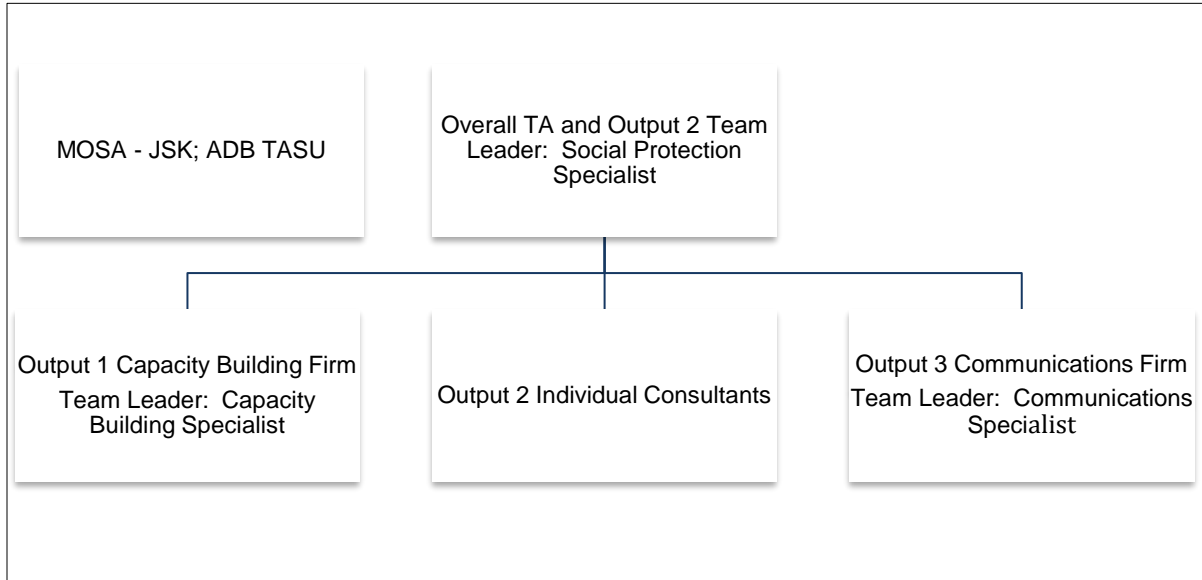
29. Preferred Qualifications and Experience. The consultant should have a degree in communications, management, or related field with 4-5 years of experience in working on communications, training, and advocacy campaigns. He/she should have good communications skills in English. Experience working in advertising and media companies, or public relations firms is an advantage.

30. **The National Social Media and Applications Specialist (18 person-months).** The specialist shall review social media exposure and webpages of PKH and provide an assessment of their effectiveness and ease of use. He/she shall provide options on web, mobile applications, and social media applications that PKH can use to improve communications with the different audience (policy makers, general public, media, etc). He/she shall also develop such applications or platforms (online Q & A, helpline, and the like) to be used by project staff in continuing learning, feed backing, reporting, or monitoring of program operations. The specialist will also train a core staff on the use of these platforms and applications and prepare well-written manuals for dissemination.

31. Preferred Qualifications and Experience. The national social media and applications specialist should have at least 3–5 years' experience in internet marketing/communication, and website and social media design. The specialist shall have a bachelor's degree in communications or computer programming, web design, or similar fields.

32. Consultants will report to executing agency/implementation agency and the ADB TA officer. Assignment will be in Jakarta, Indonesia on an intermittent basis over a 24-month period from quarter 3, 2018 to 2020. All TA activities and training will be done in coordination with the overall TA and Output 2 team leader and approved by ADB and implementation agency. Each output will have an output team leader who will coordinate closely with the overall team leader. The overall team leader will provide guidance and advisory support to the two other outputs. The experts will work closely with MOSA and JSK. In undertaking the tasks, they will coordinate with appropriate units and staff of the executing agency/implementation agency.

Figure 1: Reporting and Coordination Arrangements



Source: Asian Development Bank.